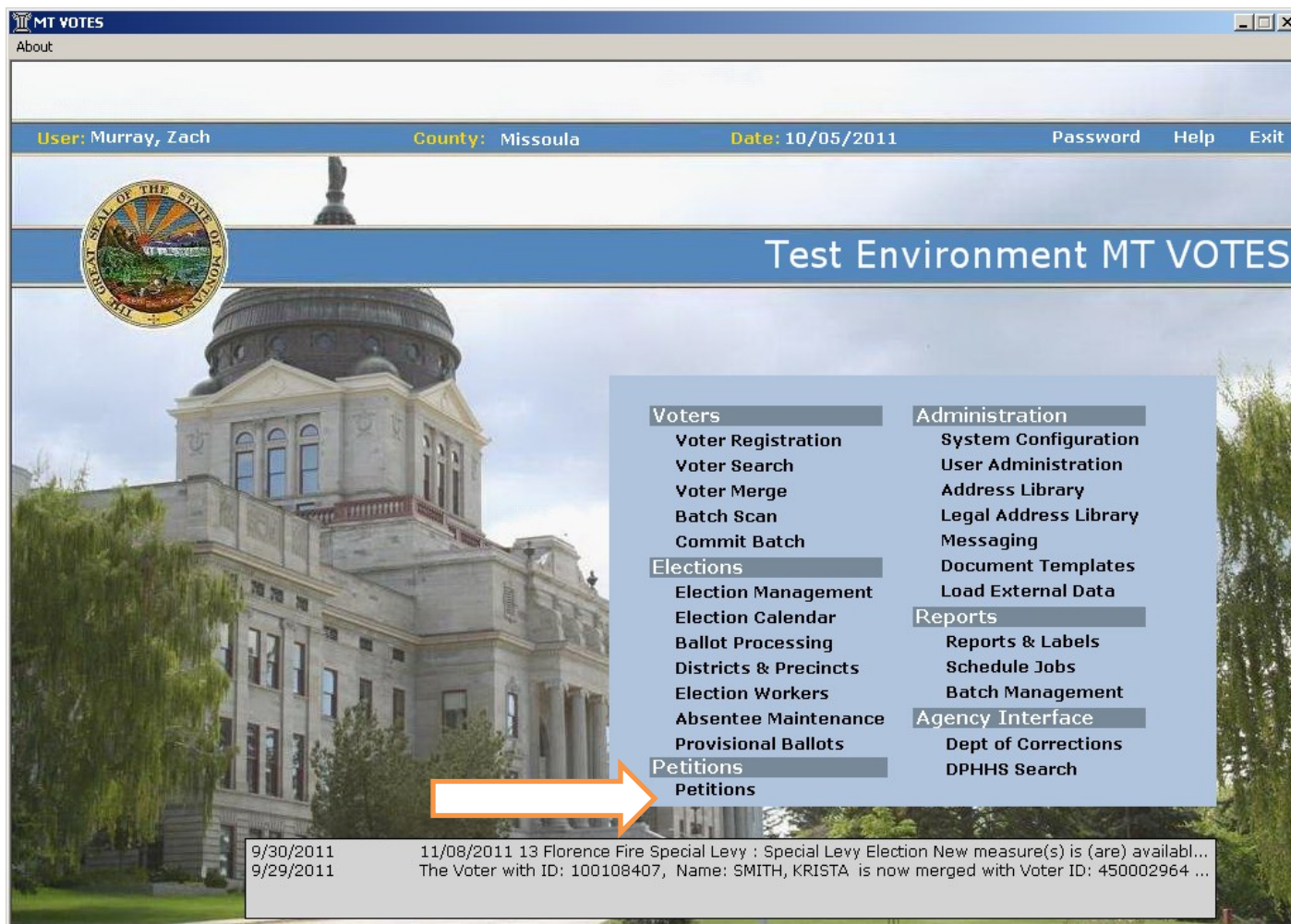Office of Montana Secretary of State
Linda McCulloch

Petition Module

THE PETITION SCREEN OPENS WITH A SEARCH SCREEN.
FROM HERE YOU CAN SEARCH BY PETITION #, TITLE, DISTRICT TYPE, STATUS
OR DISTRICT. IF YOU SEARCH BY TITLE, YOU CAN USE THE FULL TITLE OR THE
WILDCARD (%).

ADDING A NEW PETITION:
THIS BEGINS BY CLICKING ON THE "NEW" BUTTON

FOR THIS EXAMPLE WE WILL CREATE A PETITION THAT WILL REQUEST THE SEELEY LAKE FIRE DISTRICT TO BE DIVIDED.
THE PETITION WILL BE A FIRE DISTRCIT PETITION FOR THE VOTERS OF THE SEELEY LAKE AREA AND THE ELECTION WILL BE HELD ON 11/3/2010 AND CIRCULATION WILL END 7/10/2010.

ONCE THE PETITION IS SET UP, HIT SAVE AND YOU WILL RECEIVE A MESSAGE THAT THE RECORD HAS BEEN CREATED SUCCESSFULLY. ALSO IN THIS SCREEN SELECT THE NUMBER OF LINES ON EACH PETITION SHEET. (IN THIS CASE THERE ARE 5 LINES PER SHEET) FINALLY, YOU WILL NEED TO CLICK ON "REFRESH" OR THE INFORMATION WILL NOT APPEAR IN THE NEXT SCREEN.

IN THIS SCREEN, YOU CAN ALSO ADD ANY CIRCULATORS THAT YOU MAY HAVE. IF YOU DO NOT HAVE ANY SUBMITTALS AT THIS TIME, WE WILL LOOK AT ADDING CIRCULATORS LATER.

NOW WHEN YOU LOOK IN THE MAIN SEARCH SCREEN OF THE PETITION MODULE YOU CAN SEE THE NEW PETITION.

WHEN THE PETITION IS HIGHLIGHTED YOU WILL SEE THAT THE PROCESS SIGNATURES BUTTON IS "GRAYED OUT". THIS IS BECAUSE THERE ARE NO SUBMITTALS ATTACHED TO THIS PETITION. ONCE A SUBMITTAL IS CREATED THIS BUTTON WILL BE MADE ACTIVE. TO BEGIN PROCESSING A SUBMITTAL, SELECT THE DETAIL BUTTON.

EACH SUBMITTAL MUST HAVE A CIRCULATOR ATTACHED TO IT. THE CIRCULATOR CAN BE ENTERED EITHER WHEN THE PETITION IS FIRST SET UP, OR ADDED EACH TIME A NEW SUBMITTAL IS ENTERED. BEGIN BY SELECTING "NEW".

IN THIS CIRCULATORS SCREEN YOU CAN ADD A CIRCULATOR A COUPLE OF DIFFERENT WAYS. YOU CAN ADD BY LINKING TO A VOTER IF THE CIRCULATOR IS REGISTERED OR YOU CAN ENTER THEIR INFORMATION MANUALLY.

CLICKING THE <u>LINK TO VOTER</u> BUTTON, ONCE YOU'VE ENTERED THE CIRCULATORS NAME, WILL BRING UP A LIST OF POTENTIAL VOTERS.IF THE PERSON COMES UP YOU CAN SELECT THAT PERSON AND THE INFORMATION ON THE PREVIOUS SCREEN WILL AUTOFILL.

NOTE IF ONLY ONE RESULT IS FOUND MATCHING THE NAME ENTERED THE SYSTEM WILL AUTOMATICALLY POPULATE THERE INFORMATION ON THE CIRCULATORS SCREEN, WITHOUT TAKING YOU TO THE SEARCH RESULTS SCREEN. BE SURE TO CHECK ANY SYSTEM POPULATED INFORMATION FOR ACCURACY.

HERE IS THE INFORMATION FOR THE PERSON SELECTED THROUGH "LINK TO VOTER". YOU CAN ALSO FILL IN THE INFORMATION WITHOUT LINKING TO VOTER. ONCE THE CIRCULATOR IS ENTERED, SAVE THE RECORD AND IT WILL APPEAR IN THE LIST OF CIRCULATORS.

AS YOU CAN SEE THE CIRCULATOR APPEARS IN THE LIST. IF YOU HAVE OTHER CIRCULATORS TO ADD, CLICK ON NEW TO CONTINUE. IF YOU ARE ADDING A NEW CIRCULATOR YOU CAN MANUALLY ENTER THE CONTACT INFORMATION BY DOUBLE CLICKING ON THE MAILING, RESIDENCE OR WORK ADDRESS BUTTON.

BELOW IS THE UPDATE SCREEN THAT APPEARS IF YOU ARE MANUALLY ENTERING THE CIRCULATORS INFORMATION. ONCE YOU HAVE MANUALLY ENTERED THE CIRCULATORS INFORMATION CLICK UPDATE TO STORE THE ADDRESS.

HERE, JOHN DOE HAS BEEN MANUALLY ENTERED, WITH HIS MAILING AND RESIDENTIAL ADDRESS ENTERED. ONCE A CIRCULATOR IS ENTERED ONCE, THEY DO NOT HAVE TO BE ENTERED AGAIN. IF YOU DO, IT WILL JUST MAKE THE LIST KEEP ON GROWING!

WHEN FINISHED ADDING CIRCULATORS CLICK ON THE CLOSE BUTTON AND IT WILL TAKE YOU BACK TO THE PETITION PAGE WHERE YOU CAN BEGIN ENTERING SUBMITTALS.

NOW THAT CIRCULATORS HAVE BEEN ADDED YOU CAN BEGIN TO PROCESS THE SUBMITTALS THAT THEY HAVE TURNED IN TO YOU. BEGIN BY CLICKING ON "PREPROCESS SHEETS".

IN THIS SCREEN YOU WILL ASSIGN A NUMBER TO THE SUBMITTAL, ASSIGN THE CIRCULATOR AND SHOW HOW MANY PAGES AND LINES ARE IN THE SUBMITTAL.

IN THIS EXAMPLE I HAVE USED THE AUTOASSIGN TO DESIGNATE THIS SUBMITTAL AS #1, THE CIRCULATOR IS JOHN DOE (CHOSEN FROM DROP-DOWN) AND THIS SUBMITTAL HAS 3 PAGES WITH 5 LINES ON EACH PAGE. NOW THIS INFORMATION IS SAVED.

THE NEXT STEP IS TO ENTER THE SHEET INFORMATION, SHEET BY SHEET. I ENTERED PAGE #1 AND IT AUTOFILLED THE LAST GOOD LINE ONCE I HIT TAB. IF ALL THE LINES ARE GOOD, THE SAVE BUTTON IS HIT. IF HOWEVER, THERE ARE LINES THAT ARE NOT GOOD, YOU WILL NEED TO CHANGE THE CODE TO REFLECT THE LINES THAT ARE CROSSED OUT OR BLANK, ETC.

ON THIS PAGE, OF THE 5 LINES 2 ARE NOT GOOD. LINE #1 IS BLANK AND LINE #3 IS CROSSED OUT. ONCE THE INFORMATION IS ENTERED HIT THE SAVE BUTTON AND IT WILL TAKE YOU TO THE NEXT PAGE.

NOTE CONTINUING TO HIT SAVE AFTER THE PROCESSING THE ORIGINAL NUMBER OF PAGES SPECIFIED UNDER RECEIVED BULK SHEETS WILL CAUSE THE SYSTEM TO ADD ADDITIONAL PAGES TO YOUR SUBMITTAL.

CONTINUE TO ENTER THE SHEET INFORMATION UNTIL YOU HAVE ENTERED THE ENTIRE SUBMITTAL. ONCE ALL THE PAGES HAVE BEEN PROCESSED CLICK THE "COMPLETE", "CLEAR" AND "CLOSE" BUTTON.

NOTE The label button, when clicked, will generated a barcoded label for every submittal you have entered for this petition. These can be scanned on the petition detail screen to have the system take you to process signatures.

AFTER ALL OF THE SHEETS HAVE BEEN PREPROCESSED THE NEXT STEP IS TO ACTUALLY PROCESS THE SIGNATURES. IN ORDER TO BEGIN THIS, THE REFRESH BUTTON MUST BE CLICKED

TO PROCESS SIGNATURES, HIGHLIGHT THE SUBMITTAL AND CLICK ON THE PROCESS SIGNATURES BUTTON.

ALTERNATIVELY, IF YOU HAVE ALREADY PRINTED SUBMITTAL BARCODE LABELS FROM PREPROCESS SHEETS YOU MAY SCAN THEM IN THE PROCESS SIGNATURE FIELD.

To begin checking signatures click on the "Next Unprocessed" button and it will take you to the screen where you can search for voters. This screen is the place where you can see the petition, line by line as it is completed

The signature processing screen allows a search for the petition signers in a variety of ways. The search can be by name, phone number, address, or mailing address or any combination of these criteria. The search function works much like the search function in the main module. Once you have found a petition signer, you will either accept it or reject it.

In this example I searched for my name. If I had searched by last name, all the registered voters with the same last name would have come up. You will need to click on "select" before accepting. If the signature on the petition matches the signature shown, all you need to do is click on "Save & Next" or F9. The system defaults to the Accepted status.

If however, the signature did not match, it will be rejected. The default rejection reason is not registered, which can be selected by clicking the Not Registered button at the bottom of the screen. There are several other reasons for rejection and can be selected as applicable. Once you accept or reject the signature and click "save & next" it will automatically move to the next line to be processed.

If a voter attempts to sign the petition more than once, the system will not count the name twice and the following message will pop up. A message similar to this will also come up if the voter is cancelled or registered out of the district.
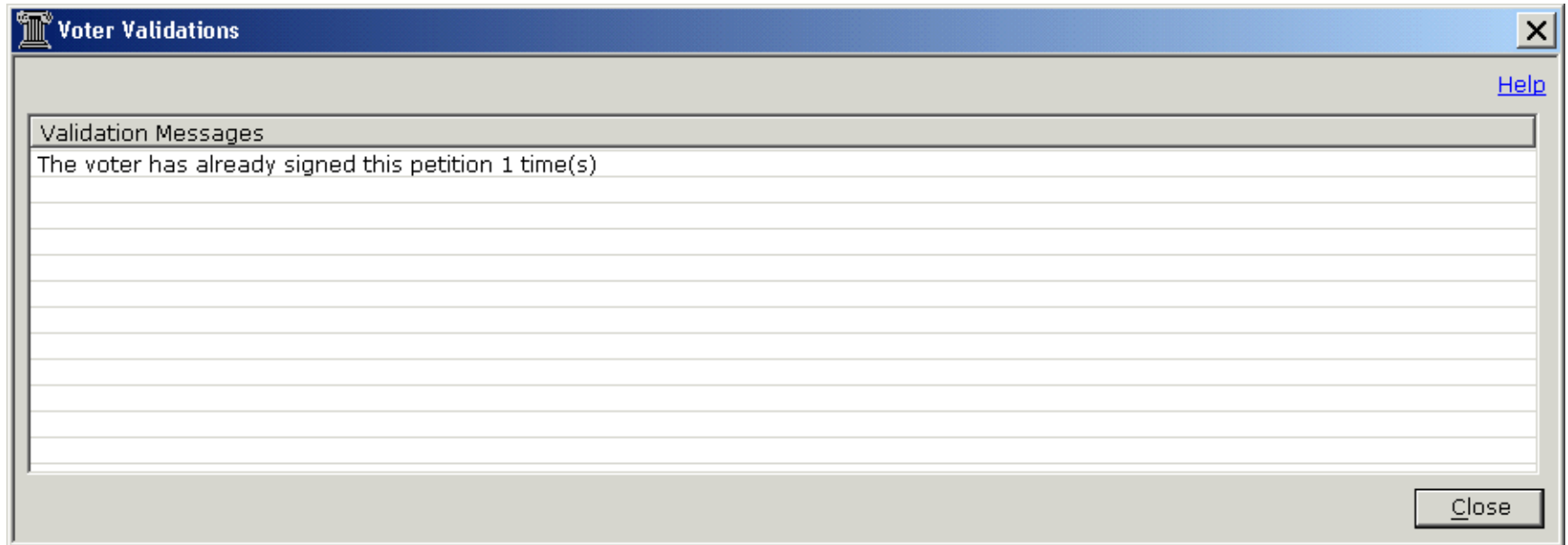
For a duplicate signature the system will default to Rejected but you will still need to select Duplicate as the reason before saving and moving to the next signature.

You can always check on the petition by closing the signature screen and going back to the Query screen. Here you can see that my name was accepted the first time, but rejected the second time and reason for the rejection is because it is a duplicate signature. The "Next Unprocessed" button will take you back to the signature verification screen.

If you are unsure if the signature is correct you can also review their registration or pull up the full image of their registration card. This often helps as the card will often show more of their writing style.

When the full image is pulled up you will have access to all the images that you have scanned.

From the Query screen you can also correct errors that you might make. In this case I skipped a line. To correct this I can highlight the line and either double-click on it or click on "Process Single Result". This will take me back to the signature verification screen and will be set for that line.

NOTE It is now possible to add additional lines from the Process Signatures screen. You must select the line above which you want the new line to appear. For example, if you click Page 3 Line 1 and click additional line it will add a new line 2 and you're page three will now have 6 lines.

When processing a single result such as this, it will only allow you to select the signature and "Save". You will then need to close the screen and then go to the "Next Unprocessed" line.

Reports. At any time there are several reports that you can run from this Query screen.

You can run a report that shows all the circulators for this petition.

The Petition Processing Statistics Report shows the number of accepted and rejected signatures on the petition, as well as the reasons for the rejected signatures.

The petition signers report shows all the names on the petition.

The petition signature statistic report will display statistics for the petition submittals and signatures.

Searches can also be run from the Query screen, including a search for all signatures accepted, signatures rejected by reason, and you can search by page # and line # as well.

Reports can also be run from the Reports & Labels module.
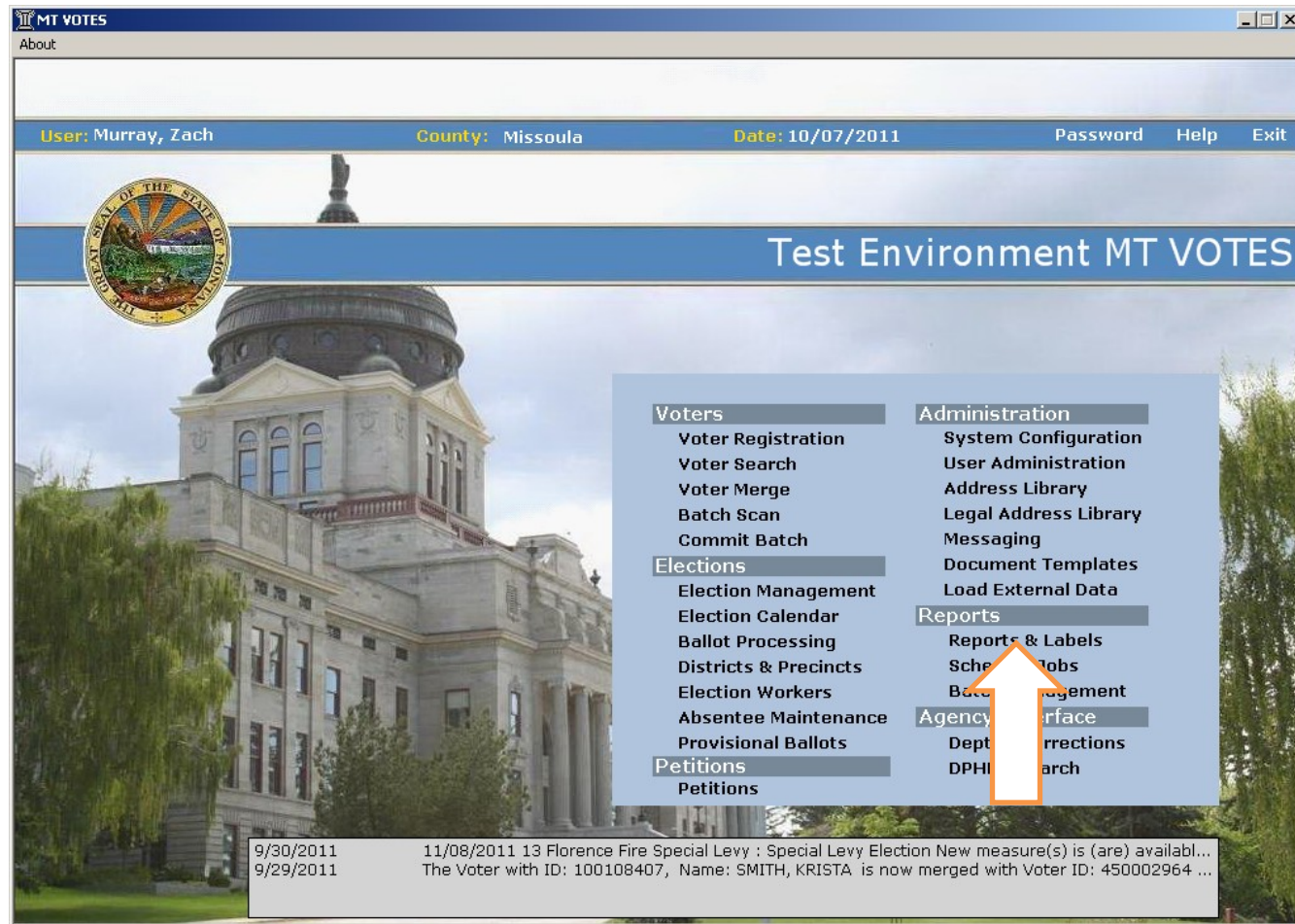
Once in the main reports page, go to the Petitions link
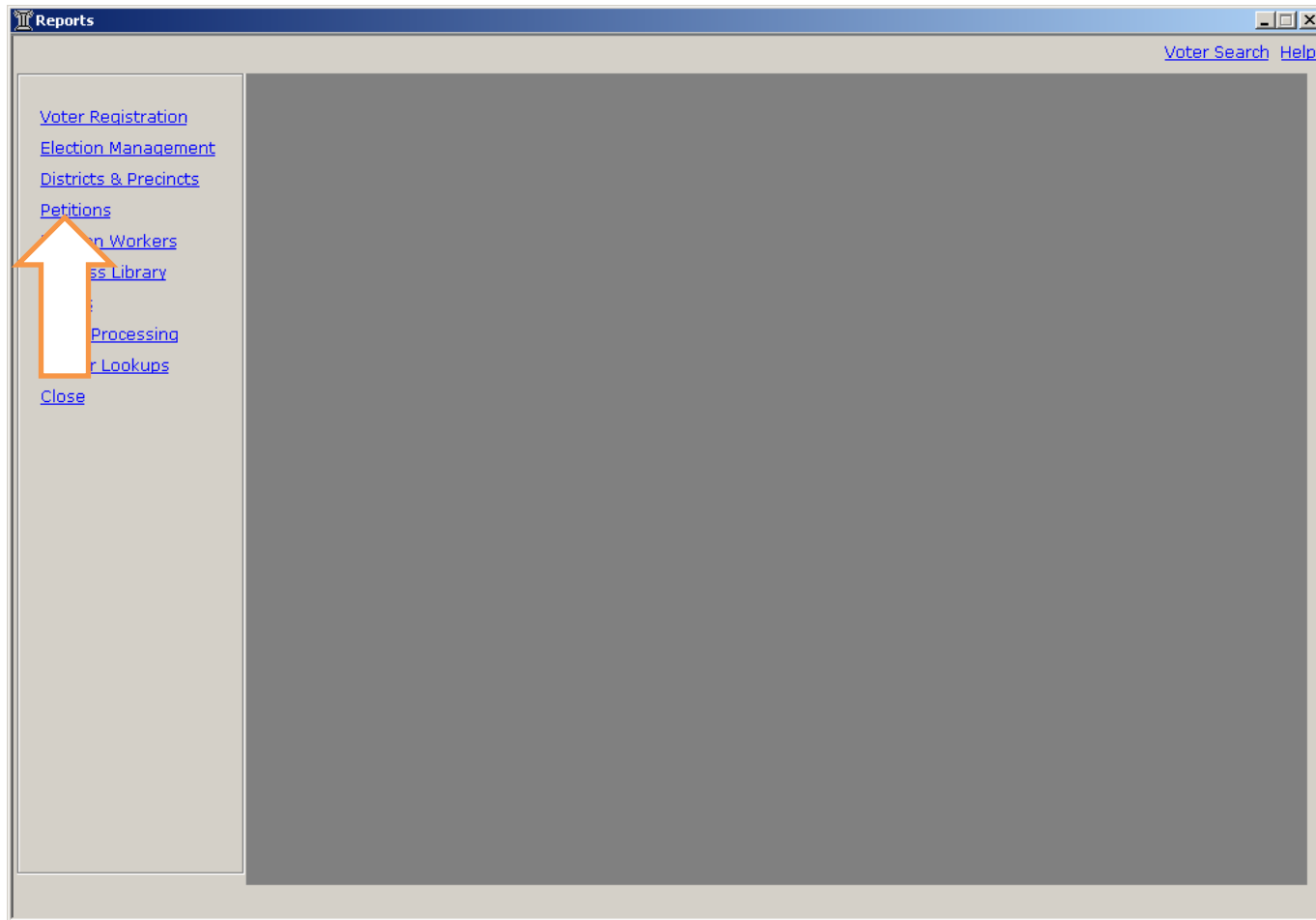
The report that is most often used is the PM-009 which gives the number of verified signatures by House District. This is the report that you will complete and send in to the Secretary of State's office when processing statewide petitions.

If processing a statewide petition, select the Petition name, type and submittal desired

This certification will be attached to the original copy of the signed petitions, completed by you and sent into the SOS office, by certified mail, within 4 weeks of your receipt of the signed petitions.

Petition Basics to Remember

- 1. Before you send the original statewide petitions, you must make copies of these petitions to keep in your office.

- 2. The deadlines for petitions to be submitted to County Election offices, and for election administrators to file certified ballot issue petitions with the Secretary of State's office, can be found on the SOS website at sos.mt.gov/Elections/Ballot_Issues

- 3. State statute requires that for statewide ballot issues, signature gatherers are MT residents and cannot be paid per signature. You are not responsible for policing these requirements.

- 4. Counties can no longer print the abbreviated ballot language – *the law was changed when the then Attorney General went to vote and found that the polling place did not have the complete text available as required by law.*

- 5. A notarized Affidavit of Signature Gatherer must be completed for each submittal. A submittal can be up to 25 petition sheets. For example, if a signature gatherer brings in 35 petition sheets they will have to have 2 affidavits attached. (1 for 25 pages and the second one for the 10 remaining pages)

- 6. If you are not sure of the answer to a statewide petition question, contact the Secretary of State's office elections division at soselections@mt.gov or at (406) 444-5346.

- 7. For a local petition, refer to 7-5-101 through 7-5-140, MCA and ask your city or county attorney for assistance. If they are unsure of the answer have them contact the Secretary of State's office.

As always, please feel free to contact the Help Desk, at 1-866-541-6767, with any further questions you have.